NBS Training: Phoenix Patient Entry

Student Guide

Table of Contents

New Patient Request Entry: Course Overview

Chapter 1

New Patient Request Entry: Course Overview

nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Track 2 End User Training
August 2003
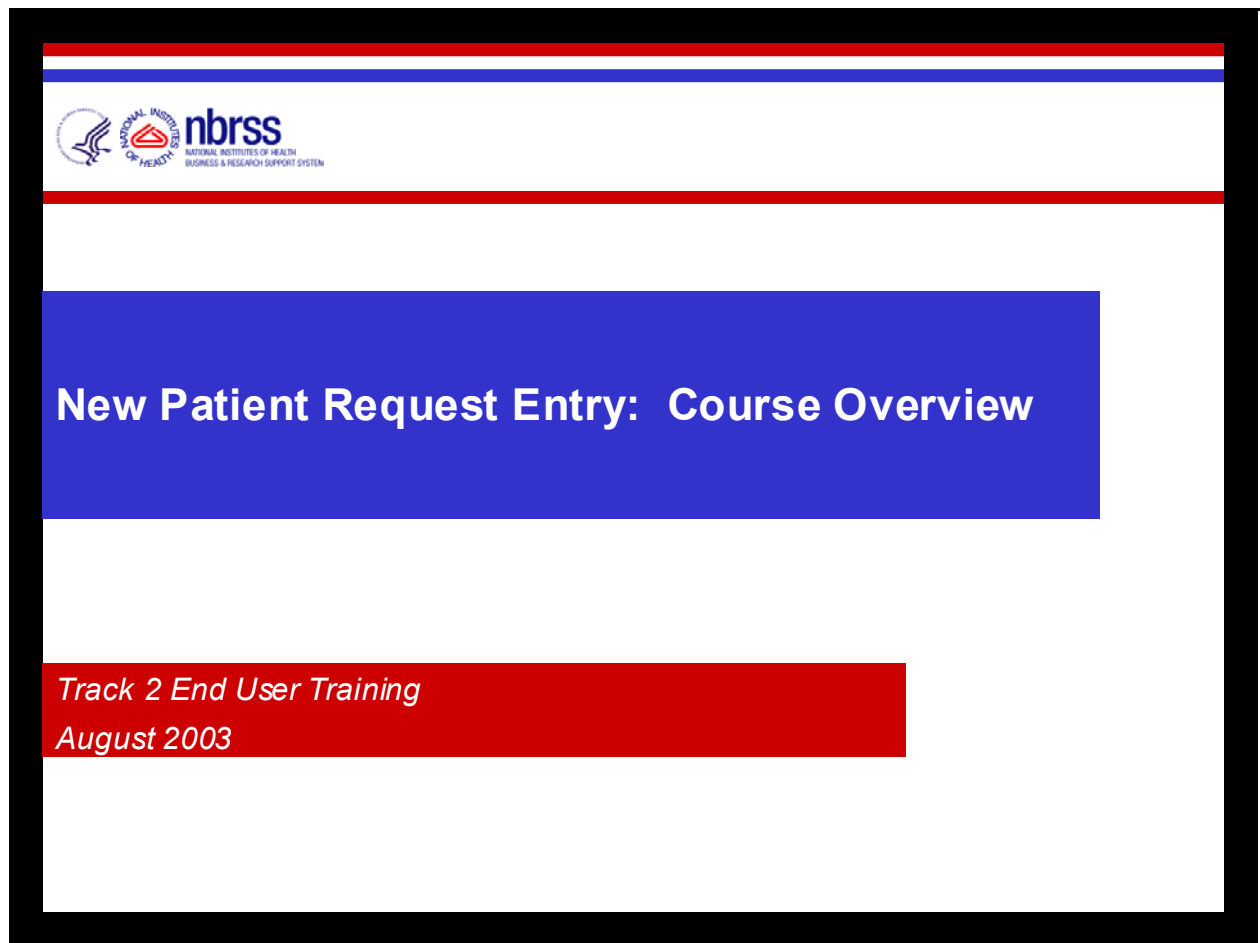
Course Objectives

Course Objectives

- Overview of the NBRSS and NBS

- Oracle Basics

- New Patient Request Processes

- Important Dates and Activities

Page 1

Agenda

Agenda

1. Discuss NBRSS and NBS Project
2. Short Introduction to Oracle
3. Discuss New Patient Entry Process
4. Hands-on Exercises
5. Wrap Up

Page 2

Training Guidelines

1. Ask Questions

2. Cheating is encouraged

3. Don't let me get ahead

4. Have fun!

Questions

Questions?

Page 4

How to Use the Manual

Chapter 2

nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

How to Use the Manual

Track 2 End User Training
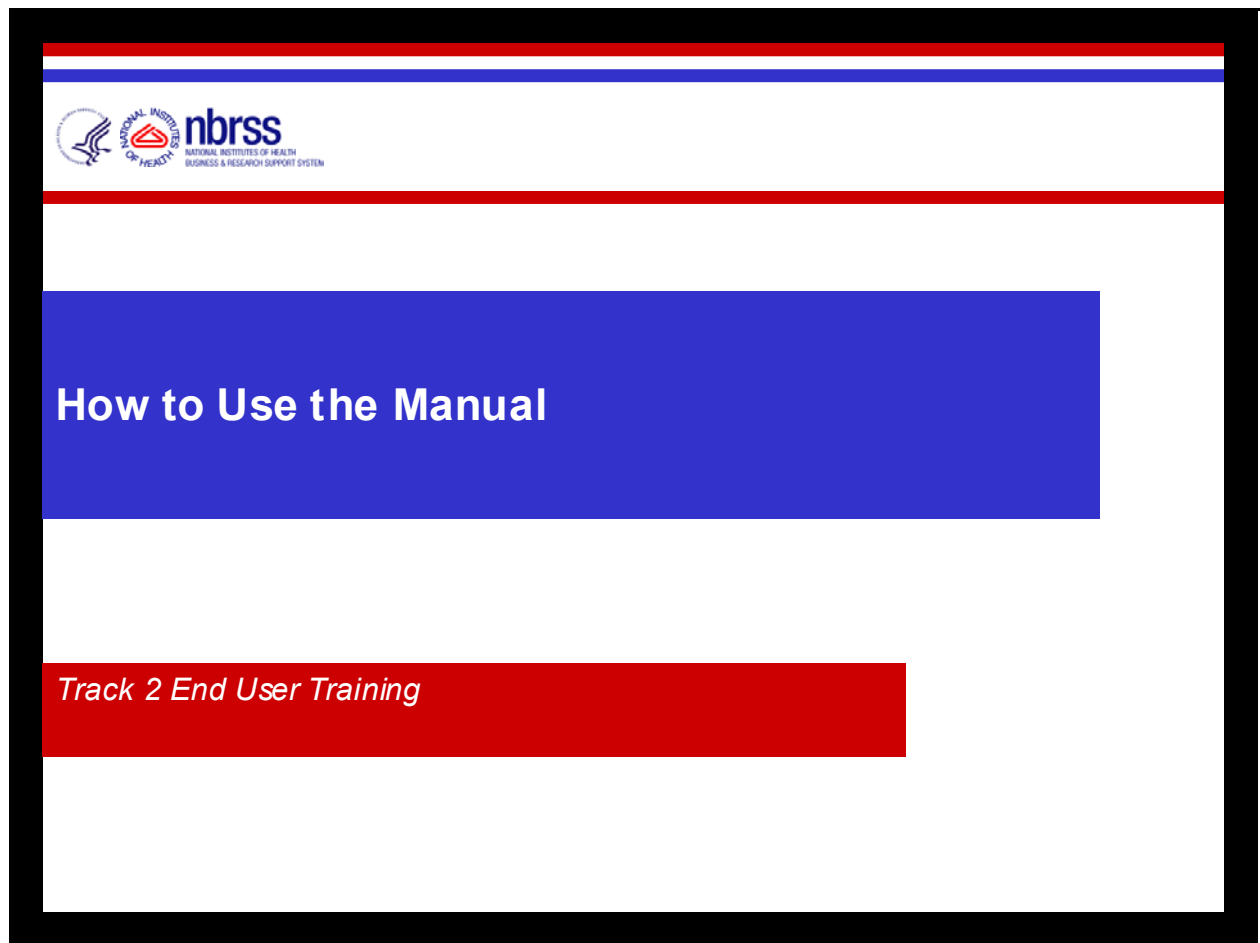
How to Use the Manual

➤ Each Student Guide contains a Table of Contents

Table of Contents

Page 1

How to Use the Manual

How to Use the Manual

➢ Each Chapter constitutes a lesson

➢ Each lesson has a set of objectives

Lesson Objectives

Lesson Objectives

After this lesson you should know how to:

- Process customer addition requests
- Process customer update requests
- Conduct routine customer table maintenance activities

Page 1

Page 2

How to Use the Manual

How to Use the Manual

➢ The lessons contain information on the business processes as well as step-by-step instructions on how to perform tasks in the NBS

New Customer Addition Request Process

New Customer Addition Request Process

IC Enters Request

Travel Planner searches for existing sponsor record

Travel Planner downloads Customer Addition Request form from the NIH Travel Portal Page

Travel Planner completes the form and emails it to the NBRSS Customer Requests Mailbox

OFM Processes Request

1. Access request

2. Search for Existing Customer

3A. Enter Request

3B. Reject Request

4. Inform Requestor

5. Move Request

Page 8

All requests should be submitted via email. Requests will be forwarded to a central mailbox, accessed through Microsoft Outlook.

Page 3

How to Use the Manual

Step-by-step instructions on how to perform tasks in the NBS are contained in "Navigation" documents.

Navigations:

1. May contain a **Purpose** or **Prior Activity** section

2. Contain a Navigation Box on the first page

3. Contain a picture of the screen that you will use to enter the data

Entering a New Customer

Purpose
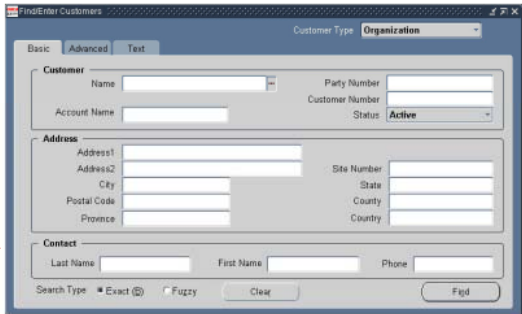
The purpose of this document is to describe how new customers are entered into NBS. If a customer already exists in NBS, but requires modification, then refer to one of the following documents:

- Entering a New Customer Contact
- Entering a New Customer Bill-To Address
- Modifying Customers

NIH Receivables Customer Entry
N > Customers > Standard
Find/Enter Customers

Page 4

How to Use the Manual

➢ Navigation Boxes describe how to get to the appropriate screen in Oracle to perform the task

NIH Receivables Customer Entry ⬅━━━━━	*Oracle Responsibility*
N > Customers > Standard ⬅━━━━━	*Navigation Path*
Find/Enter Customers ⬅━━━━━	*Screen Name*

➢ Navigation Boxes are always followed by a screen shot of the window you will navigate to.

Page 5

How to Use the Manual

How to Use the Manual

New   OK   Cancel

If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the **Cancel** button.

Goto task #1.

4. Place your cursor in the line associated with the customer contact that displays both the **Party Number** and **Customer Number**.

5. Select the **OK** button.

Result: The **Customers - Standard** window is displayed.

1. Directive statements will help you determine your next step. The statements are indicated in **Bold**

2. Words in **Bold** font indicate a field, window, or button name

Page 6

How to Use the Manual

The shaded fields indicate that the entry is optional or that you should accept the default values

7. Enter the city name in the **Site Name** field.

8. Enter the following address information.

Field	Description
Country	Select the appropriate country from the **LOV**.
Address	Enter the address line information
City	Enter the city name
State	Enter the state
Postal Code	Enter the Postal Code
Province	Enter the province abbreviation
County	Enter the county name

Example: The following is a sample completed **Supplier Sites** window.

If a field is not referenced, you should not change the default value.

Page 7

How to Use the Manual

Notes provided after the task instruction provide useful information or helpful hints to complete the step.

13. In the **Payment Method** field, select the appropriate payment method for this supplier.

    Note: Once bank information is associated with a supplier, the **Payment Method** field is automatically updated to **Electronic**.

14. Save the record.

Page 8

How to Use the Manual

How to Use the Manual

The end of the task will be indicated by **End of Activity.**

Example: Below is a sample completed **Contacts: Roles** region tab.

15. Save your work.

End of activity.

How to Use the Manual

Each lesson concludes with a Lesson Summary

Lesson Summary

_____

Lesson Summary

In this lesson you learned how to:

• Process customer addition requests

• Process customer update requests

• Conduct routine customer table maintenance activities

Page 26

Page 10

NBRSS Overview

Chapter 3

nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

NIH Business and Research Support System (NBRSS) Overview

Track 2 End User Training

NIH Enterprise IT Systems Architecture
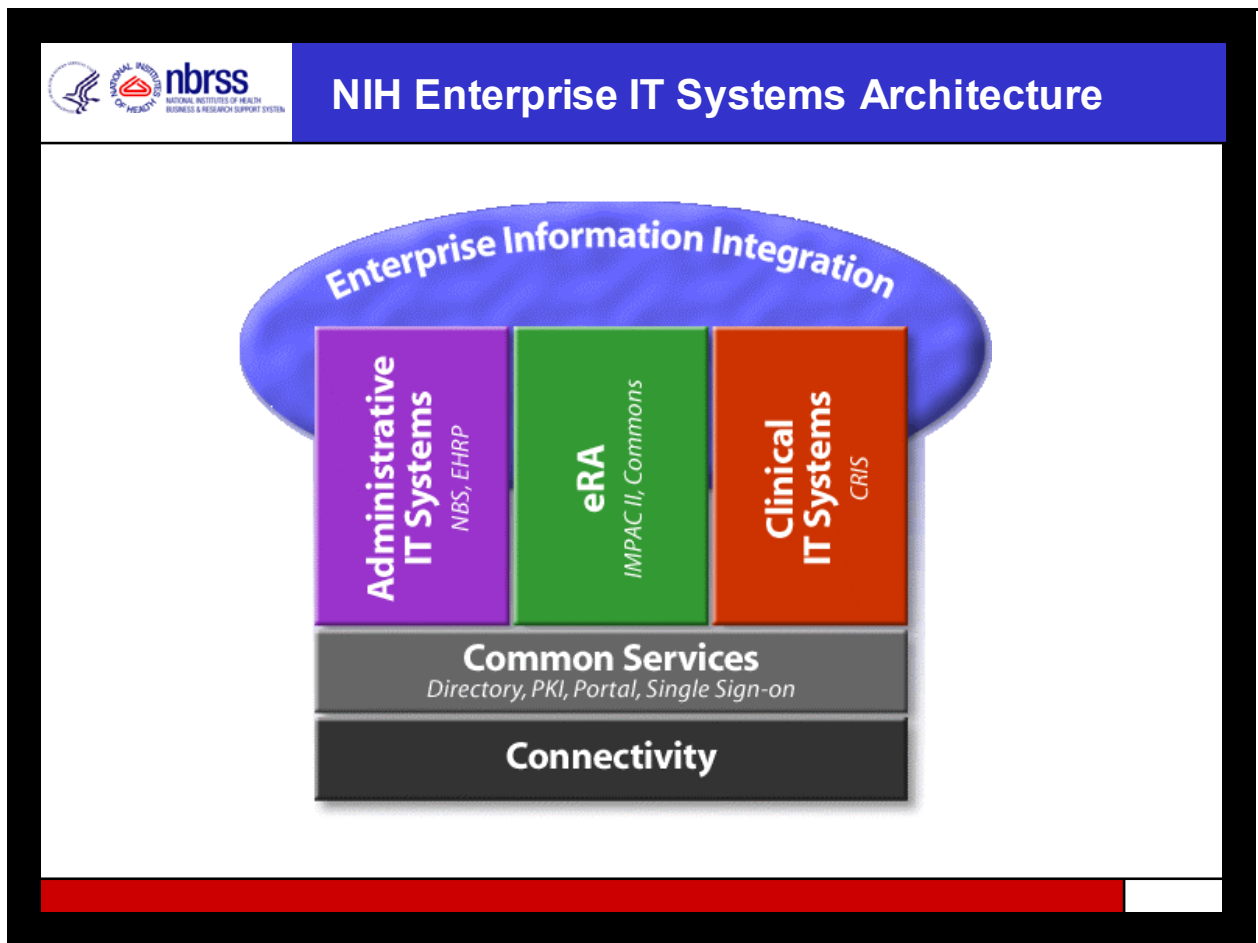
NIH Business System (NBS) – How it all started

- Project began in FY 1999 with the development of a comprehensive business case to replace NIH's Administrative Data Base (ADB).

- ADB -- An integrated data base that services most of NIH's administrative and support functions.
  - Central Accounting, Accounts Payable, Travel, Property, Acquisitions/Supply, Contracts, and Service and Supply Fund activities.
  - Transactions feed the accounting system from the point of origin, i.e., procurement requisition, travel order, etc.
  - Used by about 5,000 NIH employees, most of whom are in the Intramural Research Program.
  - Processes approximately 150,000 transactions each day.

- Work groups comprised of 200 NIH employees helped with the NIH decision to go with a commercial Enterprise Resource Planning (ERP) product.

- The challenge is not to design software but to adapt NIH business practices to the "best practices" embedded into the commercial ERP product.

Page 2

NBRSS Project Objectives

NBRSS Project Objectives

NBRSS

- ✓ **2 web-based systems to provide administrative support to NIH's scientific mission**
- ✓ **Links the NIH accounting structure with administrative and scientific support functions**
- ✓ **Incorporates industry standard "best practices"**

NBS

- ✓ **Integrates NIH's core administrative functions**
  - ✓ **Finance – Scheduled Deployment 10/1/03**
  - ✓ **Travel – Scheduled Deployment 9/1/03**
  - ✓ **Property**
  - ✓ **Acquisition/Supply**
  - ✓ **R & D Contracts**
  - ✓ **Service & Supply Fund**
- ✓ **Replaces the current Administrative Database (ADB)**

Deployed 9/9/02!

EHRP

- ✓ **Improves Human Resources and benefits management and planning across DHHS and NIH**
- ✓ **Modernizes the processing of Human Resources actions**
- ✓ **Replaced the DHHS Human Resources system (IMPACT)**

Page 3

NBRSS Governance Structure

NBRSS Governance Structure

20 NIH Leaders + 1 DHHS Rep.

Administrative Management Systems Steering Committee (AMSSC)

66 Managers & Supervisors

Functional Advisory Committees (NIH IC/OD)

Project Manager Colleen Barros (NBRSS)

IV&V

Represents formal lines of authority:
- Funct. Teams - NBRSS employees reporting to FM
- Tech. Teams - CIT employees reporting to TM
- BearingPoint employees report to SI
- CM - NBRSS employees reporting to Director
- Each, in turn, reports to Project Manager
- Functional Advisory Committee and Resource Team members are IC/OD employees serving on ad hoc basis
- Steering Committee is top policy making body

Functional Managers Leslie Siddeley (NBS) Jan Maltbie (EHRP)

Technical Managers Carol Perrone (CIT) Jack Vinner (CIT)

Systems Integrator Tom Breuer (BearingPoint)

Change Manager Susan Corey (NBRSS)

Change Management Advisory Committee (NIH IC/OD)

Functional Team Members (NBRSS)

Technical Team Members (NBRSS)

Functional, Technical and Change Management Team Members (BearingPoint)

Change Mgmt Team

140 End-users

Resource Teams (NIH IC/OD)

Page 4

NBS - An Integrated System

NBS – How it Works

➢ Typically, transactions proceed horizontally across several administrative functions.

- Administration uses the NBS to purchase a piece of equipment for a scientist.

- In *real time*, this information automatically transmits to finance to check funds availability; obligate funds; and once the equipment is received, pay the bill.

- Upon receipt this information automatically flows to property to track the equipment.
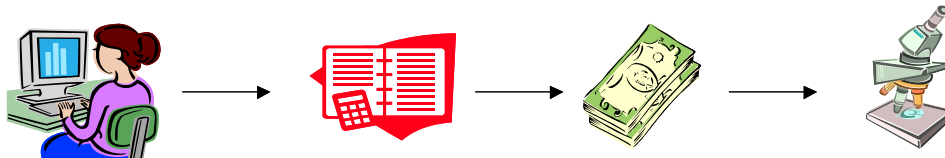
➢ Why an integrated system?

- Eliminates multiple entries;
- Minimizes the potential of errors;
- Provides accurate reports; and
- Eliminates the expense and technical difficulty of linking together systems that are dedicated to individual functions.

Page 6

Expected Benefits of the NBS

➢ One integrated system, linking each of the major business functions, including human resources;

➢ Better integration and sharing of information within the organization;

➢ Improved managerial control and access to key data; and

➢ Improved financial statements and management reports across NIH, using the new Accounting Classification Structure (ACS).

Page 7

Realities of the NBS

➢ NBS replaces a dying system – something had to be done. NBS offers a modern-day feel, but no system is perfect, and the NBS will not solve everything.

➢ NBS is not a proprietary system – we're bound by the software, and customizations are costly.

➢ There will be a phased conversion period, so we will not experience the full functionality and benefits all at once. As pieces of the current system are shut down and the new system is set up, there will be disruption.

➢ The administrative, legal, and regulatory policies outside of the NBS remain.

➢ To reap the full benefits of the NBS, local IC policies and approval levels may need to be reevaluated.

➢ The NBS project is not operating independently – it is influenced by various Department initiatives.

Page 8

Track 1 Activities: General Ledger/Budget

➢ NBS General Ledger replaces the CAS as the system of record

➢ New projects (former CANs) are created

➢ Budgets are entered based on the new accounting structure

Page 9

Sample Track 2 Activities: Travel

➤ **NBS Travel System**
  ▪ Enter, approve, and electronically route travel documents, such as authorizations and vouchers.

➤ **Accounts Payable**
  ▪ Process payments to travelers and travel management centers for expenses entered in the NBS Travel System
  ▪ Maintain the database of travelers and banking information

➤ **Accounts Receivable**
  ▪ Establish a list of sponsors that is referenced by the NBS Travel System
  ▪ Track amounts due from and paid by non-federal organizations that sponsor travel

➤ **Cash Management**
  ▪ Reconcile invoices from TMC files to expenses entered in the NBS Travel System and processed in Accounts Payable

➤ **General Ledger/Fed Admin**
  ▪ Collect data from all financial subledgers
  ▪ Record in-kind contributes from sponsors
  ▪ Enter manual journal vouchers

Page 10

Oracle Basics

Chapter 4

Oracle Basics

Track 2 End User Training
August 2003

Lesson Objectives

In this lesson, you will learn how to:

- Access the NIH Portal to Log into Oracle

- Identify main areas of the Oracle windows

- Identify important toolbar buttons and menu paths

- Search for existing records

- Exit Oracle

Page 1

Accessing the NIH Portal

In this lesson, you will learn how to:

➔ **Access the NIH Portal to log into Oracle**

- Identify main areas of the Oracle windows

- Identify important toolbar buttons and menu paths

- Search for existing records

- Exit Oracle

Page 2

Accessing Oracle via the NIH Portal

➤ Oracle is a web-based application available via the NIH Portal

➤ NIH Portal website: **http://my.nih.gov**

- To Log on use your:
  - NIH Domain
  - User Name
  - Password
- For assistance, contact NIH Help Desk at 6-HELP (301.496.4357)

➤ Add the Budget & Finance Community, which is the page where the Oracle application resides

NBRSS Application Launcher

NBS Finance
▸ Production
   General Ledger, Fed Admin, Projects

➤ Select the **NBS Production** link to launch the application.

Page 3

Logging in to the NIH Portal

Follow the steps below to access the NBS Travel System application from the NIH Portal.

- Launch Internet Explorer. In the browser, navigate to the NIH Portal at http://my.nih.gov.
  (Note: If you need Internet Explorer installed on your computer, please contact the NIH Help Desk at 6-HELP (301-496-4357))

- Log onto the NIH Portal according to the steps listed below, using the account information you currently use to log on to Windows at your workstation.

    - Select your **domain** from the pull-down menu. (Hint: Use the "Which domain should I select? link for assistance.)
    - Enter your **User Name**.
    - Enter your **Password**.
    - Click the **Log in** button.

For Portal account and password assistance, contact the NIH Help Desk at 6-HELP
(301-496-4357)

Adding a Community to your NIH Portal View

What is a Portal Community and how do I subscribe to a Portal Community?

Portal Communities provide content, documents and application access to users who have a common area of interest. Once you subscribe to a community, it will appear in the list on your Communities tab every time you visit the NIH portal. Follow the steps below to subscribe to a community.

1. Click on the "**Communities**" tab and select "**Edit Your Memberships**".
2. **Locate a community** of interest either by clicking a folder to browse for communities or by entering a key word in the Search field and clicking "Go" to look for a specific community.
3. Once you locate a community of interest, **select it** by clicking in the box next to the community name.
4. Click "**Add to my Memberships**". (You may need to select your default community.)
5. Click "**Finish**". The subscribed community will now appear in the list on your "Communities" Tab every time you access the portal.

Form Terminology

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle

➔ **Identify main areas of the Oracle windows**

- Identify important toolbar buttons and menu paths

- Search for existing records

- Exit Oracle

Page 6
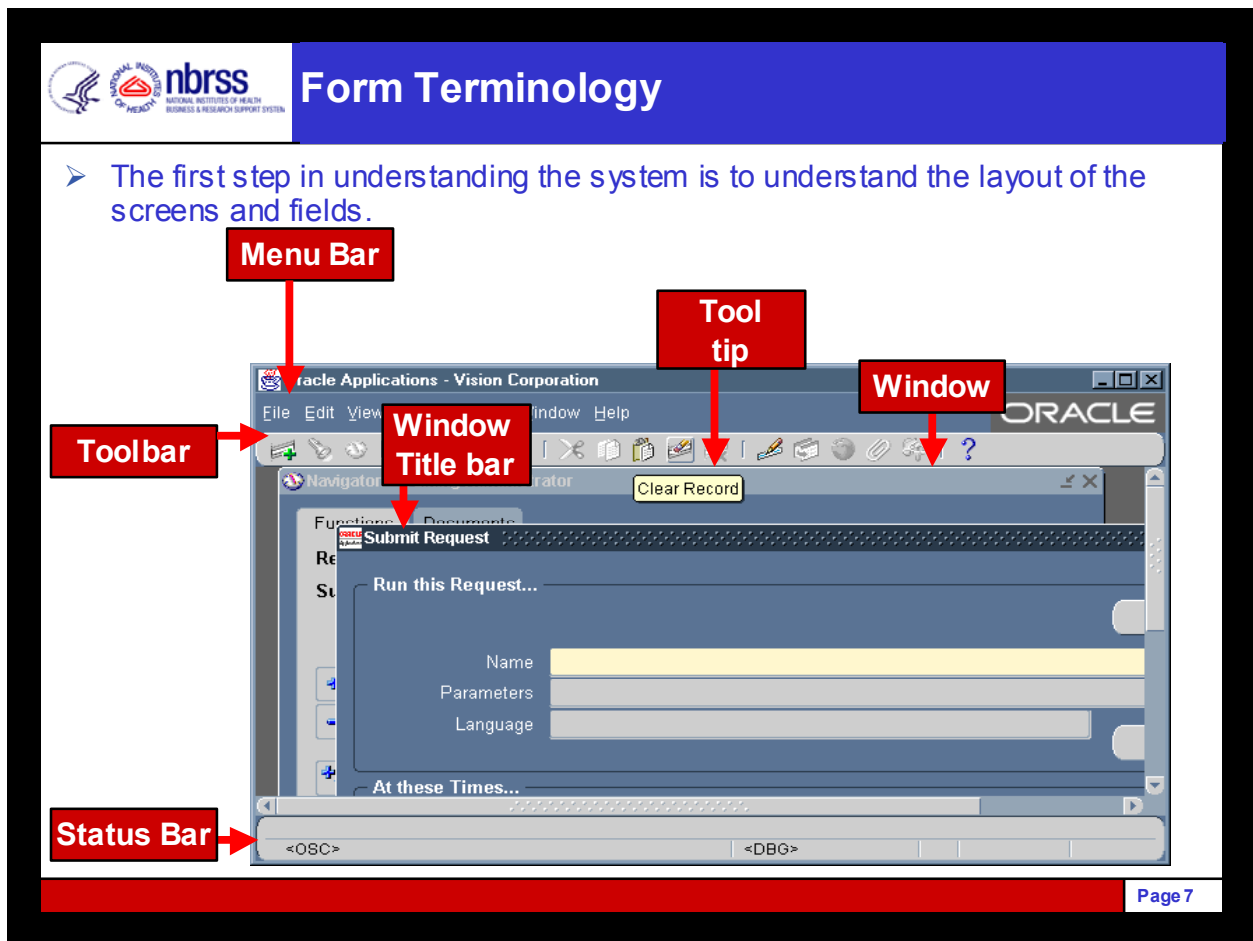
Form Terminology

Form Terminology

Oracle Applications Release 11*i* works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. Common terms used in Oracle Applications forms are listed below.

Menu bar—Use pull-down menus from this menu bar to navigate or perform actions within a form

Toolbar – Use icons from the bar to navigate or perform actions within a form

Window—An area where the user interacts with an application (Many windows can be open at one time and you can access these "overlapping" windows to perform data entry or data search activities.)

Window title bar—Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

Tool tip—Iconic bubble help that you can use to determine the function of a button on the toolbar. Appears when cursor is held over the icon.

Status Bar - The status line displays status information and pertinent information for processing your form.

Form Terminology

Form Terminology (continued)

Region—A logical grouping of fields set apart from other fields by a box outline

Region tab—A collection of regions that occupy the same space in a window where only one region can be displayed at a time

Field—An area in a window that displays data or enables you to enter data

Button—A graphic element that initiates a predefined action when you click it

Form Terminology
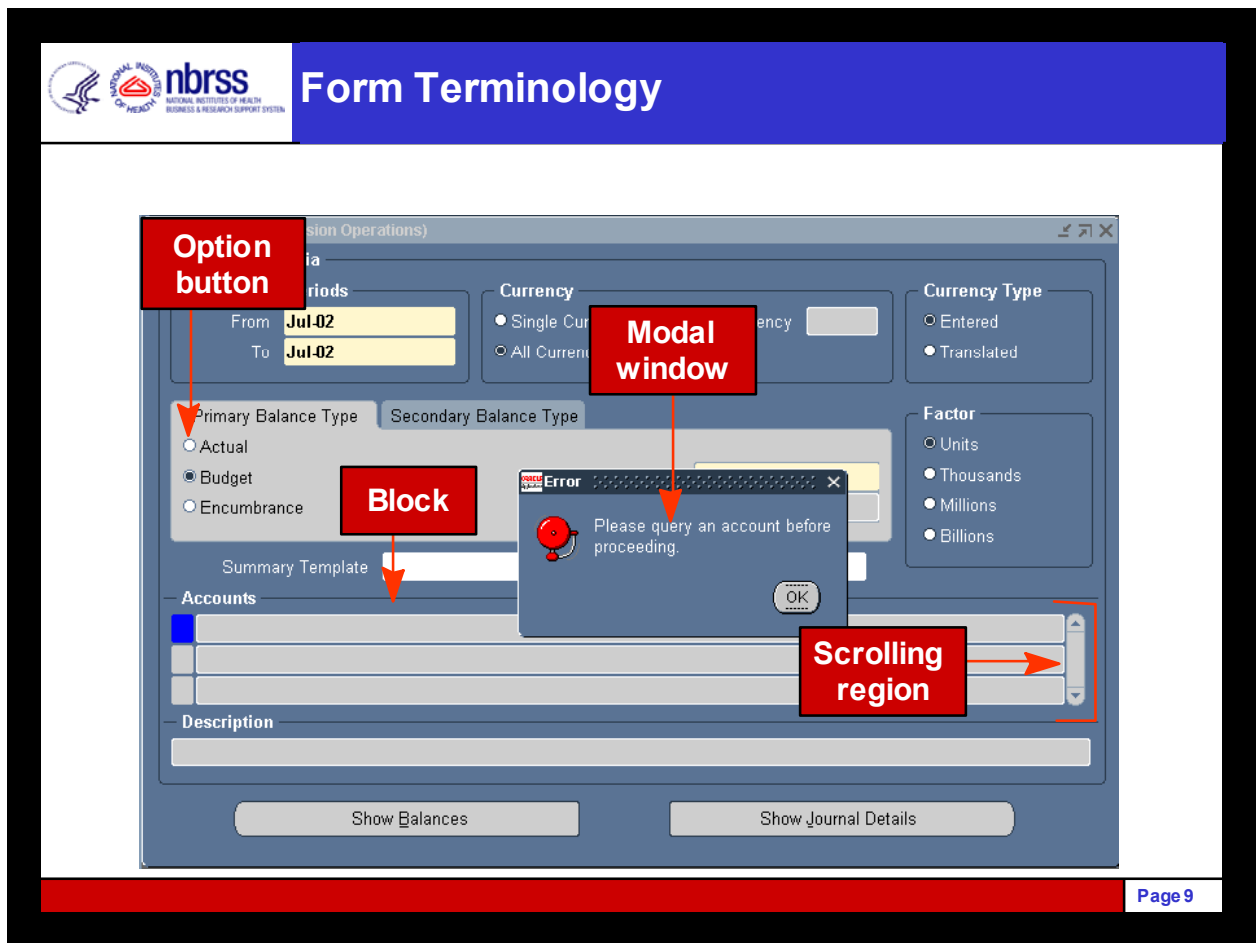
Form Terminology (continued)

Option button—A button that indicates an individual selection is available within an option group

Modal window—A window that requires you to act on its content *before continuing*

Scrolling region—A region, containing a scroll bar, in which to view other fields

Block—An area of information relative to a specific business function or entity

Field Colors

Field Colors

> Field colors indicate the attributes of the field.

Field Color	Description
White	Allow data entry
White with Green Text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

Page 10

What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

White Fields with Green Text—indicate drill-down capability

Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.

List of Values

Click the LOV icon in the field

The list of valid values is displayed

Applications

Find %

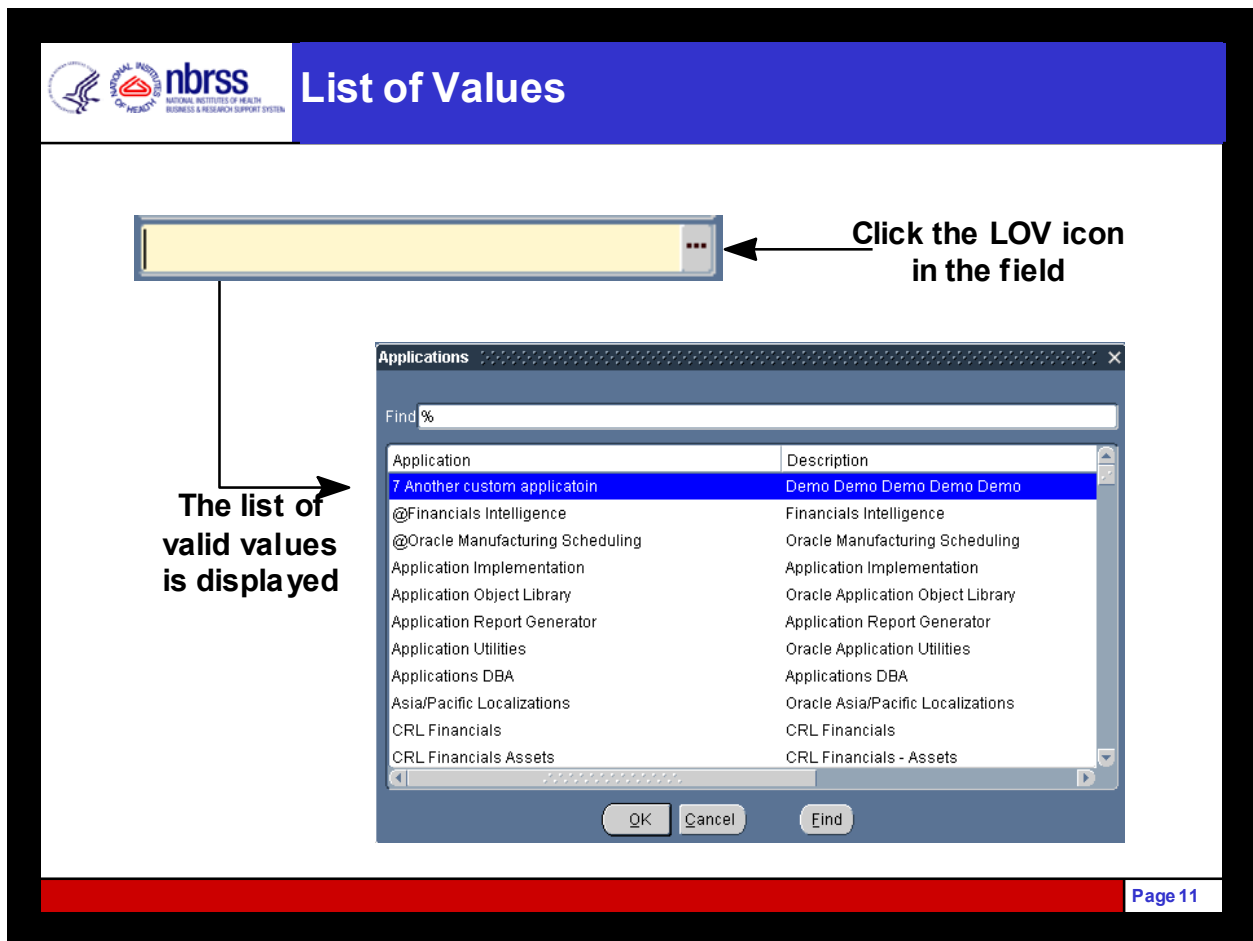| Application	Description
7 Another custom applicatoin	Demo Demo Demo Demo Demo
@Financials Intelligence	Financials Intelligence
@Oracle Manufacturing Scheduling	Oracle Manufacturing Scheduling
Application Implementation	Application Implementation
Application Object Library	Oracle Application Object Library
Application Report Generator	Application Report Generator
Application Utilities	Oracle Application Utilities
Applications DBA	Applications DBA
Asia/Pacific Localizations	Oracle Asia/Pacific Localizations
CRL Financials	CRL Financials
CRL Financials Assets	CRL Financials - Assets

OK   Cancel   Find

Page 11

Using the LOV

The List of Values (LOV) feature is very useful while entering data in Oracle Applications. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Oracle Applications notifies you when a list of acceptable input values is available for a field by displaying the LOV icon in the field. When you display a list, the values appear in a window with a title that describes the contents.

By using the LOV feature, you can save time and enter data quickly without having to memorize or look up valid data for each field. You can choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Oracle Applications to validate your input since you will know right away if your entry does not match an option from the LOV.

List of Values Auto Selection

List of Values Auto Selection

Groups ✕

Find p%

Group
Physical Attributes
Purchasing

OK   Cancel   Find
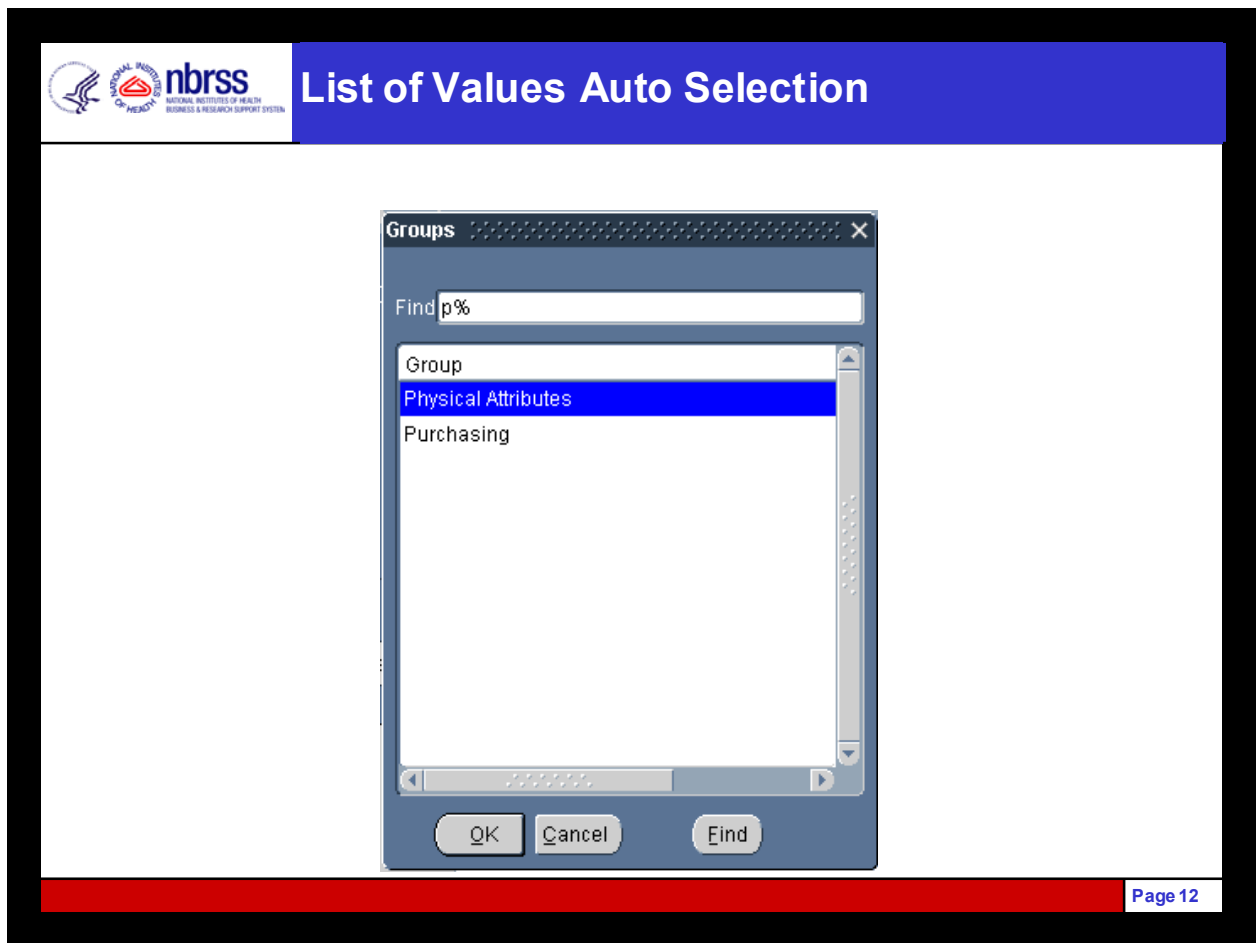
AutoSelection

Using the **LOV** feature called AutoSelection you can select a valid name from the list with a single keystroke. When you display the list window, you can type the first character of the name you want in the **Find** field. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

List Search

You can use the AutoReduction feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list.

In the list window, enter any group of characters as search criterion in the Find field and click the Find button. You can use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (_), which represents a single character in your search criterion.

For example, to reduce a list to only those choices that contain the phrase "schedule," you would type %schedule% in the Find field and click Find. In any of these list search queries, it does not

matter whether you use uppercase or lowercase letters as the search is not case sensitive. Oracle searches all of the columns in the list.

Long-List Fields

Long-List Fields

If a field has a "long-list"—that is, a list of more than 100 values—when you try to display the LOV, Oracle Applications will display a window where you can enter list reduction criteria.
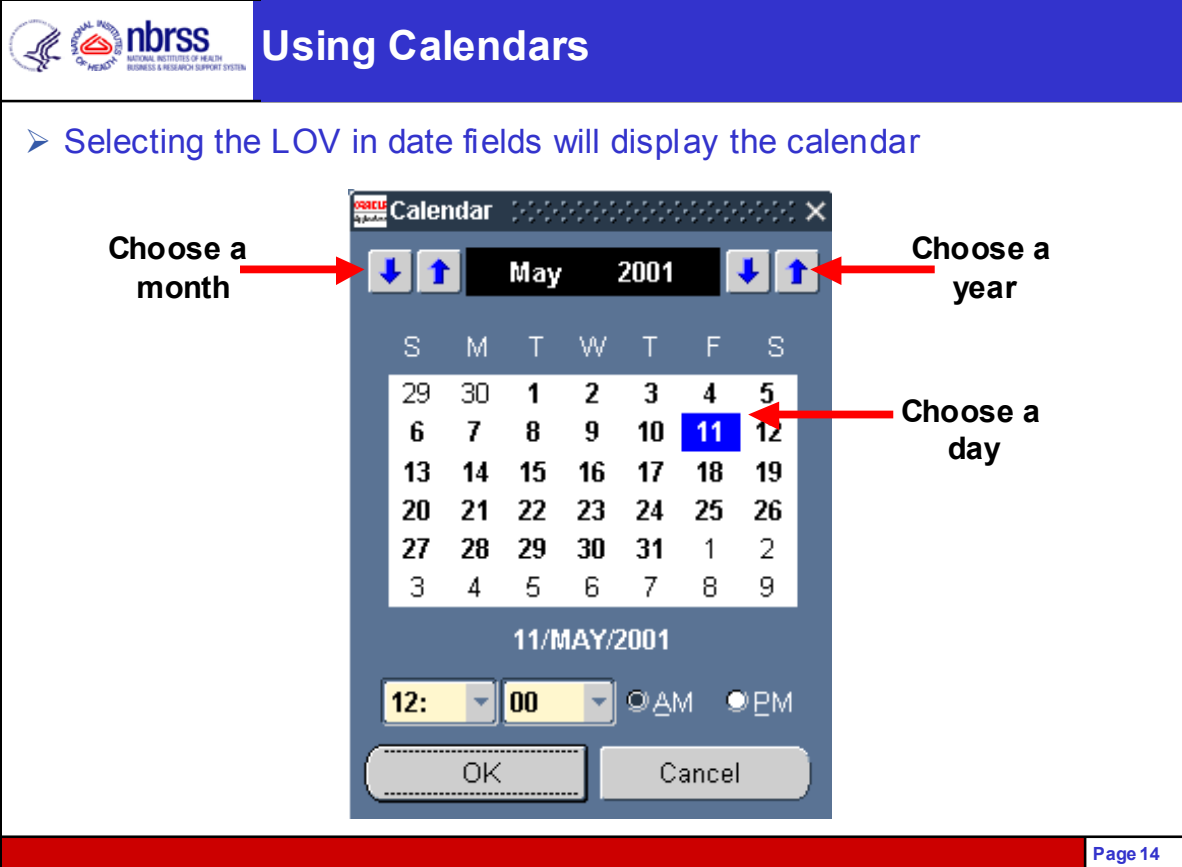
Because it takes less time to display a reduced list than a complete long-list, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. However, to view the entire long-list, enter the percent sign (%) at the prompt and all of the values will be displayed.

Note: To avoid excessive network traffic and reduced performance, try to enter specific criteria, other than just a percent sign (%), whenever possible.

Power List

The Power List feature provides an even faster method of data entry. If a field displays a List icon and you know the value you want, simply enter the first few characters of the value in the field and press [Tab]. Power List will complete the entry for you. You can also include wildcard characters with your entry. You do not need to display the list window. If more than one value matches the characters you specify, a list window containing those values is displayed. If no values match the characters you enter, a list window containing all the values appears.

Using Calendars

Using Calendars

➢ Selecting the LOV in date fields will display the calendar

Choose a month

Choose a year

Choose a day

Choosing a Date in the Calendar Window

Values in a date field can be typed directly or you can use a calendar to enter a valid value in a date field if the field displays the **LOV** icon. If your date field supports time, you can also use the Calendar window to choose a valid time with the date.

1. Put your cursor in a date field.

2. Click the List icon to display the Calendar window. The date value that appears below the calendar is called the *selected date*, which is either the value already in the field, the default value of the field, or the current system date.

3. Click on a date.

> Note: Disabled buttons that show dimmed text represent invalid days, which cannot be chosen. Similarly, if a date field is display only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.

4. Click OK to accept the selected date and close the window.

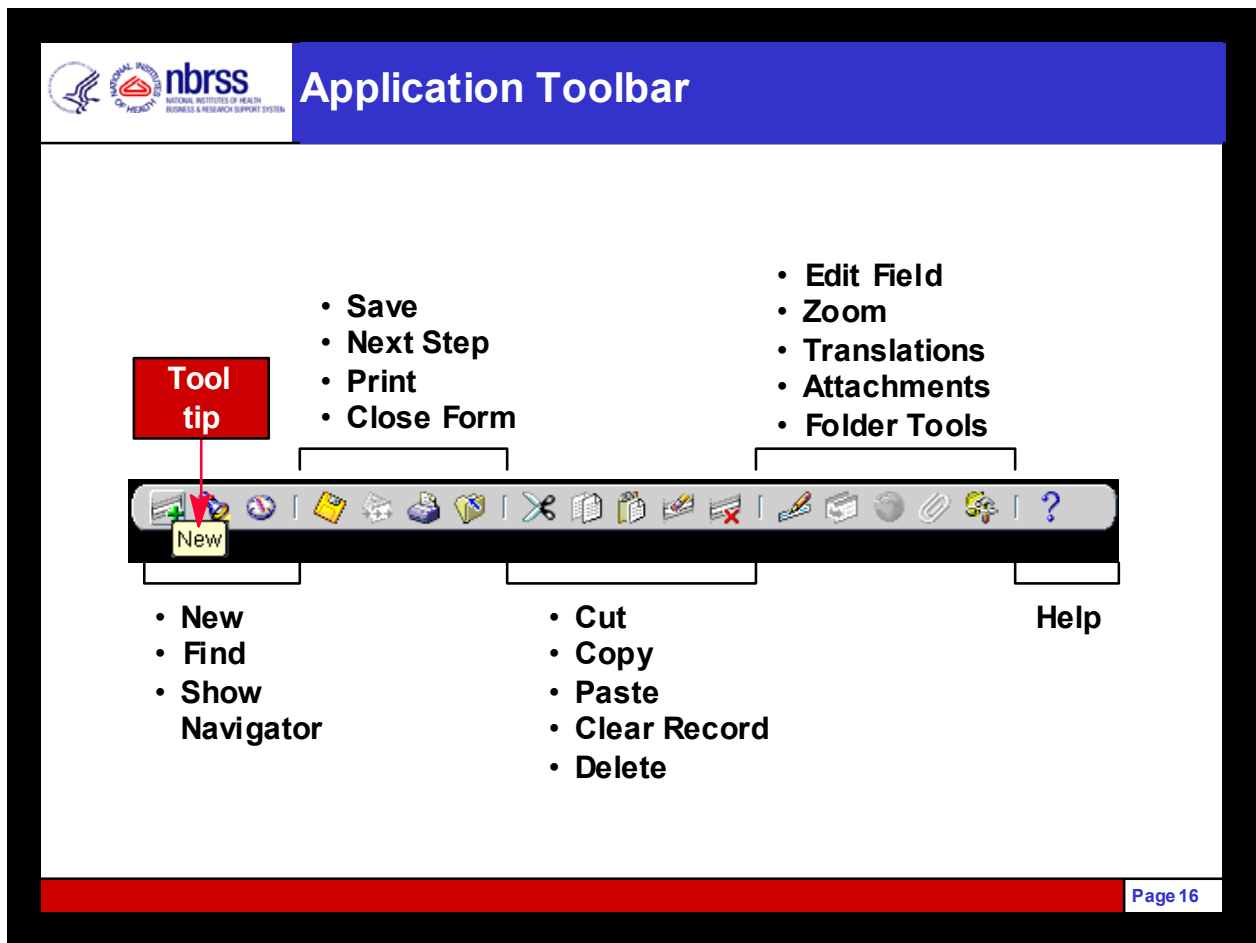5. Click Cancel if you want to close the window without choosing a date.

Application Toolbar

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle

- Identify main areas of the Oracle windows

- ➔ **Identify important toolbar buttons and menu paths**

- Search for existing records

- Exit Oracle

Application Toolbar

Application Toolbar

Tool tip

- **Save**
- **Next Step**
- **Print**
- **Close Form**

- **Edit Field**
- **Zoom**
- **Translations**
- **Attachments**
- **Folder Tools**

New

- **New**
- **Find**
- **Show Navigator**

- **Cut**
- **Copy**
- **Paste**
- **Clear Record**
- **Delete**

Help

Using the Toolbar

The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it. Each toolbar button replicates a commonly-used menu bar item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display help or a tool tip for an enabled toolbar button by holding your mouse over the button.

File, Edit, and View Menus
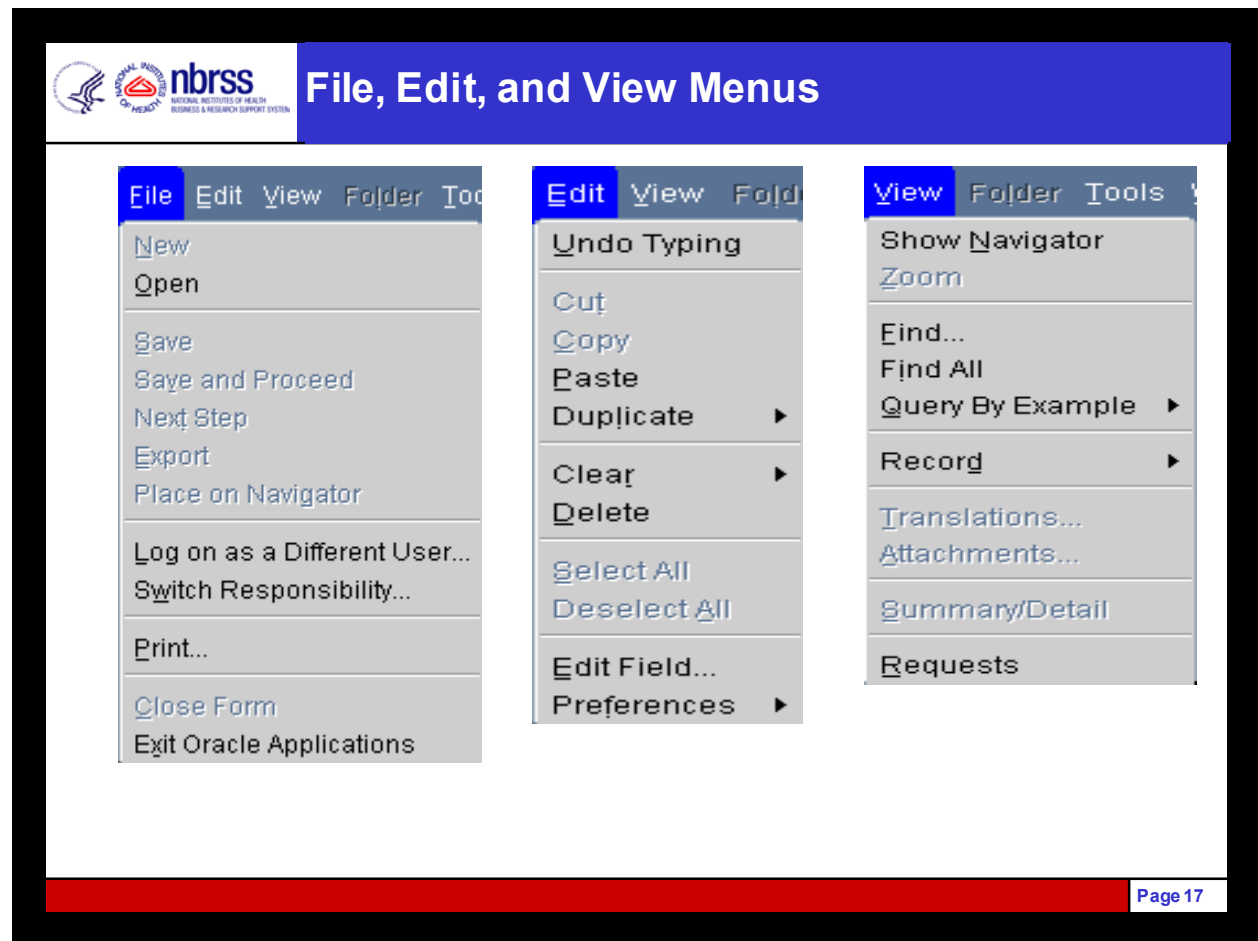
M > File

Save—Saves any pending changes in the active form.

Save and Proceed—Saves any pending changes in the active form and advances to the next record.

Export—Exports information in your current form to a browser.

Switch Responsibility—Allows you to change the responsibility in effect for your current log on.

Print…—Prints your current window.

Close Form—Closes all windows of the current form.

Exit Oracle Applications—Quits Oracle Applications.

M > Edit

Undo Typing—Undoes any typing done in a field before the field is exited and returns the field to the most recent value.

Clear Record—Erases the current record from the window.

Clear

Field—Clears the data from the current field.

Block—Erases all records from the current block.

Form—Erases any pending changes from the current form.

Select All—Selects all records (for blocks with multi-select).

M > View

Show Navigator—Displays the Navigator window.

Find All—Retrieves all records.

Requests—Displays the Request window.

Searching for Existing Records

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle

- Identify main areas of the Oracle windows

- Identify important toolbar buttons and menu paths

➔ Search for existing records

- Exit Oracle

Page 18

Using the Find Window
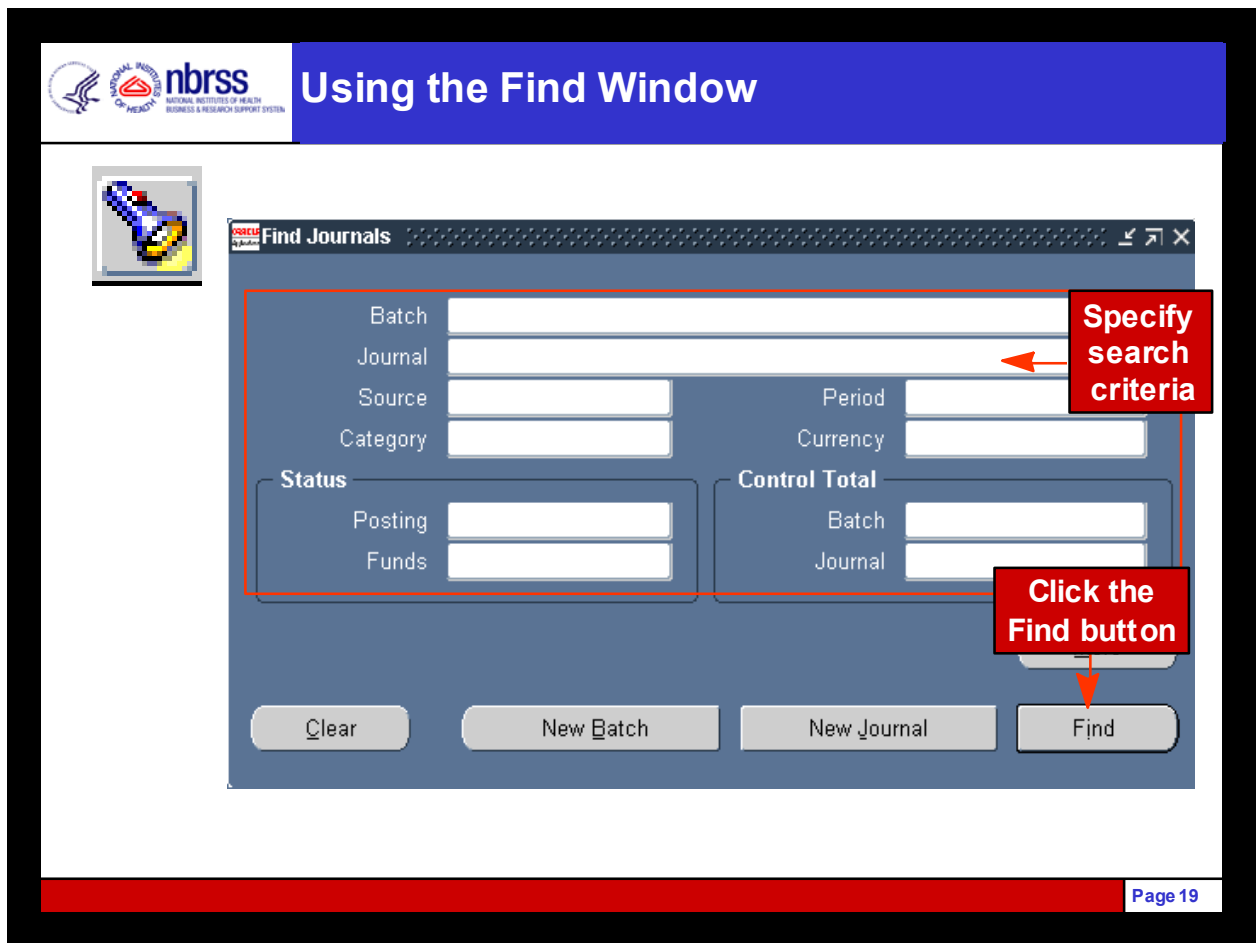
Using the Find Window

1. (M) View > Find or click the Find icon on the toolbar.

2. Enter your available search criteria in the appropriate fields of the Find window.

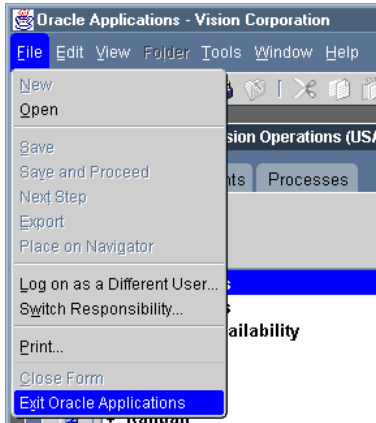> If a field does not provide a list of values for you to choose from, you can enter wildcard characters (% and _) in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.

3. Click the Find button to find any matching records.

4. Click the Clear button to clear the current search criteria from the Find window so you can enter new search criteria.

5. Click the New button to enter a new record in your current block if your search finds no matching records. Not all windows support this.

Query Results

Query Results

Your search results will be displayed on the screen.

Your status bar will indicate the total number of records retrieved.

Reviewing Your Data

After a search, Oracle Applications retrieves any records that matched your search criteria. Always enter the most selective search criteria that you can.

How to Review Retrieved Records

Use the scroll bar or the down arrow on your keyboard to view additional records currently not visible on the screen in a multirecord block.

> (M) View > Record First to see the first record.
> (M) View > Record Last to see the last record.

> **Note:** Scrolling through records and using the Record Last command uses significant system resources. Avoid this by entering selective search criteria.

Searching for Data Using Query Mode

1. Select the **F11** key (Fields turn blue)
2. Enter your search criteria, using % wildcard
3. Select the **Ctrl** + **F11** keys
4. Review the retrieved records

Exiting Oracle

In this lesson, you will learn how to

- Access the NIH Portal to Log into Oracle

- Identify main areas of the Oracle windows

- Identify important toolbar buttons and menu paths

- Search for existing records

➔ **Exit Oracle**

Page 22

Logging Out of Oracle

Exiting Oracle Applications

(M) File > Exit Oracle Applications, to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your user name is cleared from system access.

Logging Out of Oracle

Logging Out of Oracle

Close the Oracle Applications 11i window by selecting the X in the upper right hand corner.

IMPORTANT: Do not close this window

Closing this window will cause Oracle Forms-based applications to close immediately, losing any unsaved data. This window may be minimized safely at any time and may be closed once all work in Oracle Forms-based applications is complete.

Copyright ©1998, 1999, 2000, 2001, 2002 Oracle Corporation

Page 24

Lesson Summary

In this lesson, you learned how to

- Access the NIH Portal to Log into Oracle

- Identify main areas of the Oracle windows

- Identify important toolbar buttons and menu paths

- Search for existing records

- Exit Oracle

Page 25

Entering New Phoenix Patient Travelers

Chapter 5

nbrss
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Entering New Phoenix Patient Travelers

Track 2 End User Training
August 2003

Lesson Objectives

Lesson Objectives

After this lesson you should know how to:

- Request New Patient Travelers

- Request Updates to Patient Records

Requesting New Patient Travelers

After this lesson you should know how to:

➔ **Request New Patient Travelers**

- Request Updates to Patient Records

Page 2

Option 3: Oracle Extension

New Traveler Addition Request Process

Patient Entry User Enters Request
1. Receive request
2. Review request
3. Enter request
4. Update request

OFM Government Accounting Processes Request
OFM accesses the request
OFM reviews the request
OFM approves or rejects the request

Org Admin Completes Patient Setup
Org Admin generates a report that indicates new travelers
Org Admin completes traveler set up in GTM Admin Module

Approved

Traveler Added to the NBS Travel System

Rejected

Page 3

- This process is very similar to the EIN request process currently used at the NIH.

- Once the Phoenix Patient Entry User enters and saves the request in the NBS, the OFM Government Accounting department will receive an email notification that a request has been submitted.

- OFM will review the request and either approve or reject the request, indicating the reason why the request has been rejected. If OFM has questions for you prior to approving or rejecting the request, they may email or call you directly.

- You will be notified of OFM's official decision through email.

Search NBS for Existing Records
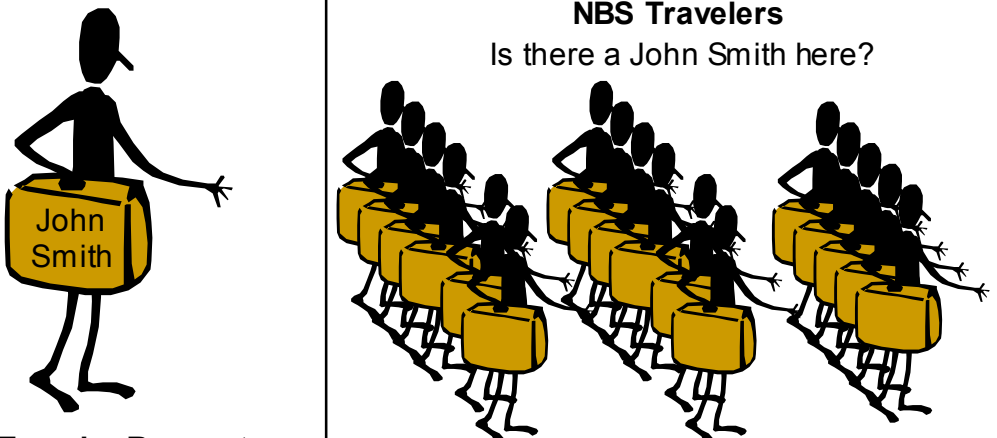
Search NBS for Existing Records

➢ You will receive a request from the individuals who enter Patient Travel documents if a traveler cannot be found.

➢ Before entering a new patient, we recommend checking the database to see if a record already exists.

1. **Receive request**

2. **Review request**

New Traveler Request

John Smith

NBS Travelers
Is there a John Smith here?

Page 4

If a new traveler request is received for an individual who exists in the NBS, inform the requestor and request that they use the existing record if applicable.

Searching for Existing Records

Searching for Existing Records

2. Review request

Enter Person

Name
- Last Name
- First
- Middle
- Title

Identifier
- Employee Number
- Social Security 111-77-8888

Gender
- Male
- Female
- Unknown

- Employment Dates ----

Personal Information
- Birth Date
- Mail
- Email
- Work Telephone

More …

Page 5

Use the Query Mode method of searching for existing records in the NBS.

- Press the F11 key and the fields turn blue
- Enter your search criteria
  - The first and last name (Use the % wildcard for partial values) OR
  - The social security number
- Press Ctrl + F11 keys to execute the search

Search in a few different ways to ensure that the record does not exist.

Look to your status bar for your query results.

To exit query mode, select the F4 key.

Searching for Employees

NIH Payables Manual Vendor Entry User

N > Employees > Enter Employees

Enter Person

NIH Phoenix Patient Entry User
NIH Baltimore Patient Entry User
NIH Clinical Center Patient Entry User
NIH Non Affiliates Entry User

N > Enter Person

Enter Person

1. Press the **F11** key to enter query mode.

    Result: The fields turn blue.

2. Enter the search criteria.

    - Enter the individual's social security number in the **Social Security** field. Be sure to use the correct format (NNN-NN-NNNN)

- Enter the individual's last name, using % wildcard.

Example: Below is a sample screen.

3. Press the **Ctrl** + **F11** keys to execute the query.

Result: The records that match your query criteria will be displayed or the status bar will read "Query caused no records to be retrieved. Re-Query"

If you would like to re-query the record, goto task #2.

If no records were found and you want to stop searching, goto task #4. Otherwise, end of activity.
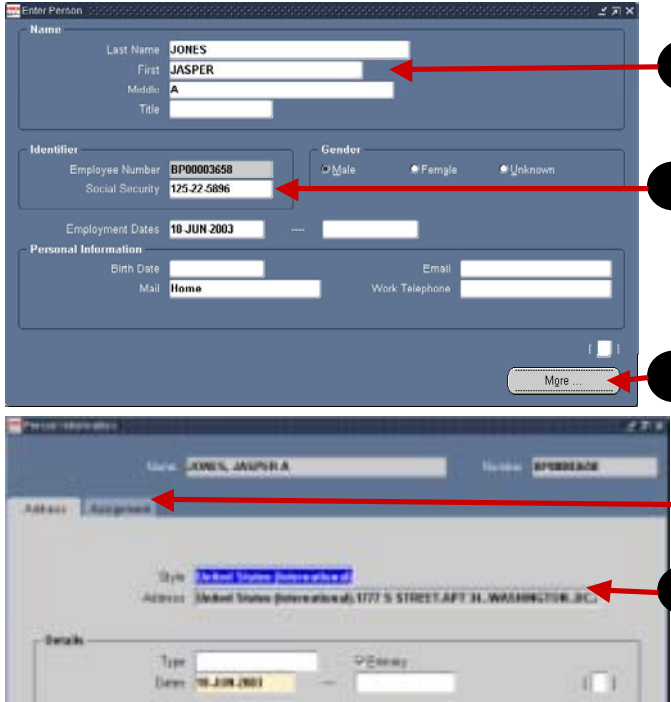
4. Press the **F4** key to exit query mode.

End of activity.

Entering A New Patient Traveler

Entering A New Patient Traveler

3. Enter request

1. Enter Patient Name
2. Enter SSN
3. Save the record
4. Select the **More** button
5. Enter the Address Information
6. Enter Assignment Information

Once you determine that this is a new patient, you will enter the request in the **Enter Person** form.

A system-generated employee number will be assigned.

The employee number for Phoenix Patients will begin with **PP**.

Entering a New Phoenix Patient Traveler Request

NIH Phoenix Patient Entry User

N > Enter Person

Enter Person

1. Enter the patient's last name in the **Last Name** field.

2. Tab to the **First** field and enter the patient's first name.

    Result: The **Employee Number** field will be populated with a value beginning with "PP".

3. In the **Social Security** number field enter the patient's social security number.

    Important: If the patient does not have a social security number, leave this field blank. In addition, request a pseudo social security number from OFM through the **Preparer Comments** field described in Step 11.

4. In the **Gender** block, select the gender of the patient.

5. Enter the following in the **Personal Information** block:

    Note: These fields are optional.

Field	Description
Birth Date	Enter the patient's birth date
Mail	Select **Home** or **Office** from the **LOV**
E-mail	Enter the patient's email address
Work Telephone Number	Enter the patient's work telephone number

Example: Below is a sample completed Phoenix patient form.

6. Save your changes.

    Note: You must save the record before proceeding to the next step or the system will stop you.

7. Select the **More** button.

    Result: The **Person Information** window is displayed.

8. Place your cursor in the **Address** field.

    <u>Result</u>: The **Personal Address Information** window is displayed.

9. Enter the patient's address and telephone information as described below.

Field	Description
Address Style	Defaults to **United States (International)**
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**
Zip Code	Enter the zip code
Country	Select a country from the **LOV**
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

Example: Below is a sample completed **Personal Address Information** form.

10. Select the **OK** button.

Result: You are returned to the **Person Information** window.

If you want to include additional comments to be displayed with your request, goto task #11. Otherwise, goto task #14.

11. Place your cursor in the **Flexfield []** located within the **Details** block.

    Result: The **Additional Address Details** window is displayed.

12. In the **Preparer Comments** field, enter additional comments on this record.

    Notes:
    – The comments will be displayed in the email notification to OFM.

– If the patient does not have a SSN, then request a pseudo SSN number in this field.

13. Select the **OK** button.

Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

14. Select the **Assignment** region tab.

Result: The assignment-related fields are displayed.

15. In the **Organization** field, delete "**NIH-BG**" and type "**HNK**".

Result: An **LOV** window will appear with a list of values.
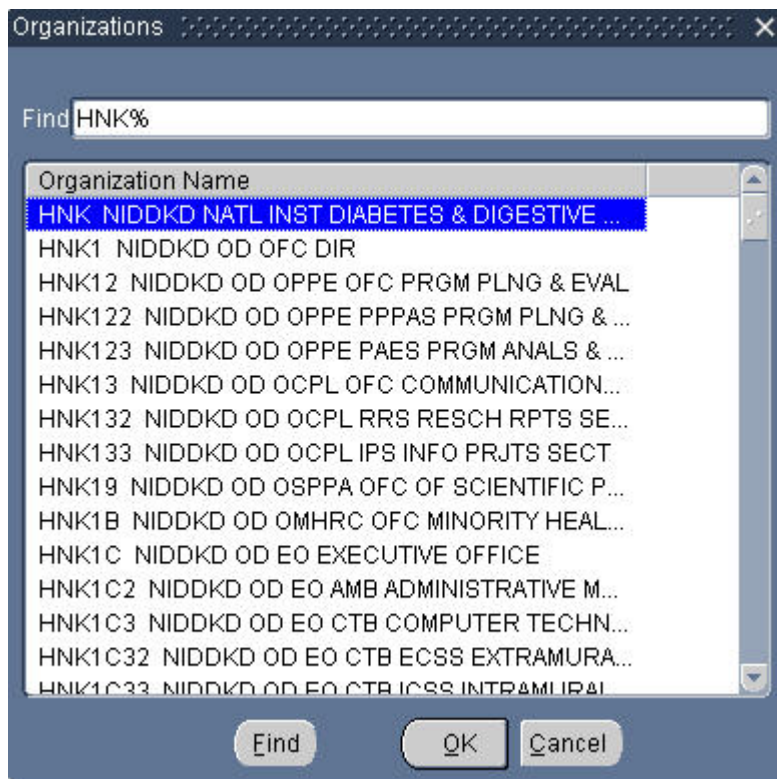
16. Select the **OK** button.

    Result: The value "HNK NIDDKD NATL INST DIABETES & DIGESTIVE & KIDNEY DISEASES" will appear in the **Organization** field.

17. In the **Job** field, enter "**PAT**"

    Example: Below is a sample completed **Assignment** region.

18. Save your work.

19. Close the **Person Information** window.

Result: The **Enter Person** window is displayed.

End of activity.

Email Response from OFM

- OFM will review the request and approve or reject it.
- You will receive an email indicating the results of their review

Accepted Request

OFM Accepted - Message (HTML)

File   Edit   View   Insert   Format   Tools   Actions   Help

Reply   Reply to All   Forward

From: Oracle Workflow a158t2c3 [a158t2c3@copper.cit.nih.gov]   Sent: Thu 8/7/2003 6:43 PM
To: Siron, Julie (NIH/NBRSS)
Cc:
Subject: OFM Accepted

Oracle Workflow Notification (FYI)

Record Type : New Record

First Name   : STARR
Last Name   : DULMAGE
Middle Name   : ALANA
Employee Number   : PP00003780
Social Security Number :
Person Type   : PHOENIX_PATIENT
Email Address   :
Address Line 1   : 256 BUCK STREET
Address Line 2   :
Address Line 3   :
City   : PHOENIX
State   : AZ
Zip Code   : 74526
Country   : US
Preparer Comments   : PLEASE ASSIGN PSEUDO SSN.

Page 7

Email Response from OFM

If the request is rejected by OFM, review the comments listed in the body of the email to determine the next course of action.

If a duplicative record has been found in the NBS, then request your organization administrator review the record.

If OFM requests additional information or a change to the format, then update the request to submit it for OFM's approval again.

Complete Lab 1: Requesting a New Patient Traveler

Requesting Updates to Patient Records

After this lesson you should know how to:

- Request New Patient Travelers

➔ **Request Updates to Patient Records**

Updating Records

Important:

You must enter the reason for your change in the Preparer Comments field when requesting an update to the record.

If you do not do so, the update request may not be sent or OFM may reject the request.

Modifying New Traveler Requests

NIH Baltimore Patient Entry User

N > Enter Person

Enter Person

NIH Phoenix Patient Entry User

N > Enter Person

Enter Person

NIH Non Affiliates Entry User

N > Enter Person

Enter Person

1. Select the **Find** button from the applications toolbar.

    Result: The **Find Employees** window is displayed.

---

2. Enter the search criteria as described below:

Field	Description
Full Name	Select the person's full name from the **LOV**
Number	Enter the employee number or select it from the **LOV**.
Social Security	Enter the person's social security number or select it from the **LOV**.
Location	Enter the person's location or select it from the **LOV**.
Supervisor	The NIH currently does not use this field.

3. Select the **Find** button.

Result: The record is displayed.

4. Modify the information on the **Enter Person** window as necessary.

5. Save your work.

6. Select the **More** button.

    Result: The **Person Information** window is displayed.

7. Place your cursor in the **Address** field.

   Result: The **Personal Address Information** window is displayed.

8. Modify the traveler's address and telephone information as described below.

Field	Description
Address Style	Defaults to **United States (International)**
Address Line1	Enter the street address of the person
Address Line2	Enter additional street address information
Address Line3	Enter additional street address information
City	Enter the city information
County	Enter the county information
State	Select the state information from the **LOV**
Zip Code	Enter the zip code
Country	Select a country from the **LOV**
Telephone	Enter a telephone number for the person
Telephone2	Enter an alternative telephone number for the person

9.   Select the **OK** button.

Result: You are returned to the **Person Information** window.

10. Place your cursor in the **Flexfield []** located within the **Details** block.

Result: The **Additional Address Details** window is displayed.

11. In the **Preparer Comments** field, enter additional comments on this record.

    Notes:
    – Describe the changes made to the traveler record.
    – The comments will be displayed in the email notification to OFM.
    – If the patient does not have a SSN, then request a pseudo SSN number in this field.

12. Select the **OK** button.

    Result: The **Additional Address Details** window closes and you are returned to the **Person Information** window.

If changes to the organization are required, goto task #13. Otherwise, goto task #15.

13. Select the **Assignment** tab.

14. Tab to the **Organization** field and use the **LOV** to locate the correct organization.

15. Save your work.

16. Close the **Person Information** window.

   Result: The **Enter Person** window is displayed.

End of activity.

Complete <u>Lab 2: Updating an Existing Request</u>.

Lesson Summary

In this lesson you learned how to:

- Request New Patient Travelers

- Request Updates to Patient Records

Important Dates and Information

Chapter 6

Important Dates and Information

Track 2 End User Training

Initial Oracle Set Up Required

The first time you log into the NBS, you will be required to:
➢ Download Oracle J-Initiator and
➢ Update your internet browser security settings

Refer to the technical guidance provided on the NBS Technical website:http://nbs.nih.gov/technical.html

Page 2

NBS Travel Support Resources

- ➢ **NBS Travel Web links available 24/7**
  - ▪ NBS Oracle Online Help and Reference: http://nbs.nih.gov/training.html
- ➢ **NIH Portal Support**
  - ▪ Phone NIH Help Desk at 6-HELP (301.496.4357)
  - ▪ Portal website address: **http://my.nih.gov**
- ➢ **NBS Customer Support**
  - ▪ Phone: Call 5-NBS7 (301.435.6277)
  - ▪ E-mail: Send e-mail to tasc@NIH.gov
  - ▪ Web Request for Support: Submit to: **http://support.cit.nih.gov**
- ➢ **nVision**
  - ▪ nVision is an evolution of the NIH Data Warehouse, and it is the new reporting system designed to work in concert with the NBS. nVision is a business intelligence system that delivers NIH-defined standard reports and facilitates the development of user-created ad hoc reports to support decision-making and analysis. The first NBS module to be supported by nVision is Travel.
  - ▪ E-mail: Send e-mail to nVisionSupport@nih.gov
  - ▪ Web Site for information: **http://nvision.nih.gov**

Page 3

Evaluation

Evaluation

**Please take a moment to complete the
on-line training evaluation**

Your comments are important to us!

Page 4

Good Luck!